NETWORK BASED SYSTEM AND METHOD FOR MARKETING MANAGEMENT

CROSS REFERENCE TO RELATED APPLICATIONS

[0002] This application claims the benefit of U.S. Provisional Application Number 60/265,019 filed January 30, 2001, which is hereby incorporated by reference in its entirety.

BACKGROUND OF THE INVENTION

[0003] This invention relates generally to a Marketing Business System (MBS), and more particularly, to network-based systems and methods to improve business intelligence, mitigate risks and maximize profit flows by tracking transactions and daily interactions.

[0004] A company typically conducts many levels of reviews when determining whether to engage in a specific marketing strategy. Most of these reviews and selection of the marketing strategy are based on general experiences of individuals involved but, often are not quantified in terms of financial returns. Decisions regarding what metrics should be used are typically based on individual tactics in either Marketing, Sales or Customer Care and are not derived from an overall strategy implementation across the entire Front Office or from relationships.

[0005] Known marketing management methods and systems, particularly related to the front office, have several disadvantages. For example, current management methods and systems are largely paper-based and time consuming. Often the information accumulated by various individuals is lost because

the information is not organized, stored or cross-referenced for future purposes. Additionally, the information is not summarized or quantified to allow management to make meaningful decisions. The problem is more acute in large organizations having multiple divisions, and especially organizations with globally distributed divisions where managing marketing function requires immediate attention, review, and decision making at various levels across the globe.

BRIEF DESCRIPTION OF THE INVENTION

[0006] In an exemplary embodiment, a searchable web-based system sets up the relationship in the database to build profiles, track results and generate reports. The system also establishes leading indicator metrics baselines to determine the current condition of the business. After the initial set up is completed, the system collects relevant data for the front office of the business against a unique identifier for easy retrieval and update, stores the data in the centralized database and cross-references against unique identifiers. The system retrieves the data from the centralized database in response to an inquiry and generates reports to facilitate the front office management to improve business productivity, reduce risks and maximize profits.

[0007] In another exemplary embodiment, a method for implementing a strategic marketing business process is disclosed. The method helps clients prepare product and service brands to mitigate risks and maximize profits. The method utilizes a web-based system including a server system coupled to a centralized interactive database and at least one client system. The method includes the steps of analyzing new marketing opportunities, identifying a new marketing strategy after alternative new marketing strategies are quantified and prioritized, refining the new marketing strategy, and implementing the new marketing strategy. The method further includes documenting benefits and leading indicator metrics to evaluate the impact of the new marketing strategy. Based on the information obtained, modifications are made to the new marketing strategy to refine it further to reduce risks and maximize profits.

[0008] In yet another exemplary embodiment of the invention, the method for providing information to a client regarding the current condition of the client's business as reflected in leading indicator metrics baselines including (a) a baseline for scoring the business's relative market position and (b) a baseline for quantifying Front Office strategy and relationship performance. The method for scoring the business's relative market position includes selecting categories from pre-defined categories, selecting a choice of description from available choices for the selected category that appropriately describes the business, and generating a Strategic Brand Readiness Factor to reflect the current condition of the business after analyzing selected choices of the description based on a pre-determined methodology. The method for quantifying Front Office strategy and relationship performance configures the RT System as an Analytical Framework and includes comparing past performance with anticipated future performance of strategy implementation in a Customer LifeCycle Profitability Model supplemented by an Interaction ROI Model. These models encompass the customers' entire life cycle and then track success in implementation against assumptions. The Analytical Framework also includes the ability to capture patterns of customer behavior precipitating an analysis of the cause and effect of relationships on profitability.

[0009] The MBS in yet another exemplary embodiment, includes a web-enabled interactive database to store and process data corresponding to contacts, businesses, users, and various interactions and cross referencing the accumulated data against unique identifiers for easy retrieval and update. The database further stores specific data corresponding to Voice Mail Scripts, and Telemarketing Scripts to be used during an Acquisition Phase, a List of Profiling Questions Script to be used during a Closing Phase, a List of Profiling Questions Script to be used during a Retention Phase and Knowledge Screens. Based on the data stored, the MBS produces a variety of reports for the management.

BRIEF DESCRIPTION OF THE DRAWINGS

[0010] Figure 1 is a simplified block diagram of a Marketing Business System (MBS) including a database architecture;

[0011] Figure 2 shows an alternative embodiment of the database architecture shown in Figure 1, a N-Tier Architecture Overview configuration for database services;

[0012] Figure 3 is an exemplary embodiment of a flow chart detailing a process to quantify marketing status quo;

[0013] Figure 4 is an exemplary embodiment of a flow chart detailing an iterative process that reduces the risks and maximizes profit flow for the business;

[0014] Figure 5 is an exemplary embodiment of a flow chart detailing the step of Analyzing New Marketing Opportunity shown in Figure 4;

[0015] Figure 6 is an exemplary embodiment of a flow chart detailing the steps of Quantifying Alternative Marketing Strategies and Identifying New Marketing Strategy shown in Figure 4;

[0016] Figure 7 is an exemplary embodiment of a flow chart detailing the step of Refining New Marketing Strategy shown in Figure 4;

[0017] Figure 8 is an exemplary embodiment of a flow chart detailing the steps of Preparing For Implementation, Implementation, and Analyzing Results of New Marketing strategy shown in Figure 4;

[0018] Figure 9 is an exemplary embodiment of a flow chart detailing the steps of Establishing Leading Indicator Metrics and Documenting Benefits and Making Recommendations to management;

[0019] Figure 10 is an exemplary embodiment of a flow chart depicting a process to build profiles;

[0020] Figure 11 illustrates a Contact Evolution Levels (CELs) visual chart showing the various contact levels;

[0021] Figure 12 is a tactics plan overview separated into Acquisition/Closing/Retention (A/C/R) Phases;

[0022] Figure 13 illustrates a tactics grid that lists a number of tactics;

[0023] Figure 14 illustrates a Relative Interaction Value (RIV) Number Grid;

[0024] Figure 15 is an exemplary embodiment of a flow chart depicting the process of configuring the system to collect data, track results and generate reports;

[0025] Figure 16 is an exemplary embodiment of an Access page user interface utilized with the MBS shown in Figure 1;

[0026] Figure 17 is an exemplary embodiment of a "Priority Action" user interface;

[0027] Figure 18 is an exemplary embodiment of a Planned Interaction "Interaction" user interface;

[0028] Figure 19 is a continuation of the "Interaction" user interface shown in Figure 18;

[0029] Figure 20 is a continuation of the "Interaction" user interface shown in Figures 18 and 19;

[0030] Figure 21 is an exemplary embodiment of a "Search Contact" user interface;

[0031] Figure 22 is an exemplary embodiment of an alternative searched for "Interaction" user interface;

[0032] Figure 23 is a continuation of the "Interaction" user interface shown in Figure 22;

[0033] Figure 24 is a continuation of the "Interaction" user interfaces shown in Figures 22 and 23;

[0034] Figure 25 is a continuation of the "Interaction" user interfaces shown in Figures 22, 23, and 24;

[0035] Figure 26 is an exemplary embodiment of another Planned Interaction "Interaction" user interface;

[0036] Figure 27 is a continuation of the "Interaction" user interface shown in Figure 26;

[0037] Figure 28 is a continuation of the "Interaction" user interface shown in Figures 26 and 27;

[0038] Figure 29 is a continuation of the "Interaction" user interface shown in Figures 26, 27, and 28;

[0039] Figure 30 is a continuation of the "Interaction" user interface shown in Figures 26, 27, 28, and 29;

[0040] Figure 31 is an exemplary embodiment of another Planned Interaction "Interaction" user interface;

[0041] Figure 32 is a continuation of the "Interaction" user interface shown in Figure 31;

[0042] Figure 33 is a continuation of the "Interaction" user interface shown in Figures 31 and 32;

[0043] Figure 34 is a continuation of the "Interaction" user interface shown in Figures 31, 32, and 33;

[0044] Figure 35 is a continuation of the "Interaction" user interface shown in Figures 31, 32, 33, and 34;

[0045] Figure 36 is an exemplary embodiment of an "Add Contact" user interface;

[0046] Figure 37 is a continuation of the "Add Contact" user interface shown in Figure 36;

[0047] Figure 38 is an exemplary embodiment of a "Contact Information Company Data" user interface;

[0048] Figure 39 is a continuation of the "Contact Information Company Data" user interface shown in Figure 38;

[0049] Figure 40 is an exemplary embodiment of a "Contact Information Personal Data" user interface;

[0050] Figure 41 is a continuation of the "Contact Information Personal Data" user interface shown in Figure 40;

[0051] Figure 42 is an exemplary embodiment of a "Contact Information Relationships" user interface;

[0052] Figure 43 is an exemplary embodiment of a "Voice Mail Script" user interface;

[0053] Figure 44 is an exemplary embodiment of a first screen of a "First Outbound Telemarketing Script" user interface;

[0054] Figure 45 is a second screen of the "First Outbound Telemarketing Script" user interface;

[0055] Figure 46 is a third screen of the "First Outbound Telemarketing Script" user interface;

[0056] Figure 47 is an exemplary embodiment of a first screen of a "Profiling Questions Closing Script" user interface;

[0057] Figure 48 is a second screen of the "Profiling Questions Closing Script" user interface;

[0058] Figure 49 is an exemplary embodiment of a first screen of a "Profiling Questions Retention Script" user interface;

[0059] Figure 50 is a second screen of the "Profiling Questions Retention Script" user interface;

[0060] Figure 51 is an exemplary embodiment of a first screen of "Profiling Questions Retention Survey #1" user interface;

[0061] Figure 52 is a second screen of the "Profiling Questions Retention Survey #1" user interface;

[0062] Figure 53 is an exemplary embodiment of a "Relationship Value Knowledge Screen" user interface;

[0063] Figure 54 is a continuation of the Relationship Value Knowledge Screen user interface shown in Figure 53;

[0064] Figure 55 is an exemplary embodiment of a "Products/Services Knowledge Screen" user interface;

[0065] Figure 56 is an exemplary embodiment of a "Company Information Knowledge Screen" user interface;

[0066] Figure 57 is an exemplary embodiment of a "Business Intelligence Knowledge Screen" user interface;

[0067] Figure 58 is a continuation of the user interface of the "Business Intelligence Knowledge Screen" user interface shown in Figure 57;

[0068] Figure 59 is an exemplary embodiment of an "Add Relationship" user interface;

[0069] Figure 60 is a continuation of the “Add Relationship” user interface shown in Figure 59;

[0070] Figure 61 is an exemplary embodiment of a “Reports” user interface; and

[0071] Figure 62 is a flow chart providing an overview of the Relationship Tracking System from the perspective of the user.

DETAILED DESCRIPTION OF THE INVENTION

[0072] Exemplary embodiments of systems and processes that facilitate integrated network-based electronic reporting and workflow process management related to a Marketing Business System (MBS) are described below in detail.

MBS Overview:

[0073] The MBS implements a strategic marketing business process, also known as business intelligence consulting, to help clients prepare product and service brands to mitigate risks and increase profit flows. Business processes are formalized in the MBS. The MBS provides a framework for a business to increase profit flows by organizing around its customers, placing a value on all its relationships and testing strategies in advance of investment. The resulting proprietary metrics provide a competitive edge which is differentiation based on exclusive customer relationships.

[0074] The MBS captures interaction and transaction details and provides on-line, up-to-date information upon request. The MBS tracks details regarding a specific transaction from inception to completion, quantifying the Interactions, and provides a status of these details to users. In the exemplary embodiment, the system utilizes at least one of a Relational Database and a Multidimensional Database with a client user interface front-end for administration and a web interface for standard user input and reports. Information is accessed in the

database through Structured Query Language (SQL), OLAP (On-Line Analytical Processing) software and other analytical software tools.

[0075] The MBS supports various levels of management hierarchy and provides access to individuals based on the position held by the individual within the business entity. The MBS has capability to download data extracted to populate commercialized database programs or spread sheet software, which provides the end-user with additional flexibility. Similarly, the data extracted can be uploaded to the MBS from commercialized database programs or spreadsheet software.

[0076] The business process implemented by the MBS follows corporate strategic planning to organize a Front Office to meet overall business objectives using a promising marketing strategy. The Front Office of a business entity refers to Marketing, Sales, and Customer Care of the business entity. The business process not only completes the next level of strategic marketing planning, but it tracks the actual results accomplished during implementation of a promising marketing strategy throughout the Front Office, creating the metrics that allow success to be replicated. The business process is a Knowledge Management application for Business Intelligence. The tracking mode of the business process is an enhancement to Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM) and integrates data from ERP and CRM essentially making the CRM tool more intelligent and tying customer relationship management process to business objectives, marketing strategy and transactions. The knowledge gained from the use of the business process in planning and tracking modes may be stored in an existing Knowledge Management tool for easy access by the Front Office personnel. Businesses more likely to find the business process attractive are the businesses that value their relationships with customers and want to have customers for life, operate in the business-to-business arena, businesses that are mid-sized and established firms with a high value offering and work with large numbers of customer base either as prospects or customers or both.

[0077] More specifically, the Strategic Marketing Business Process, or Business Intelligence Business Process mitigates risk by giving management a framework to understand and analyze business by resolving the following issues:

[0078] 1) Why the customers buy from and stay with the business,

[0079] 2) How to strengthen customer relationships,

[0080] 3) What patterns of behavior lead to more profitable results for the business, i.e. the cause and effect in their relationships,

[0081] 4) Where in the customer life cycle are specific events such as increasing purchases, giving referrals or becoming unhappy more likely to happen,

[0082] 5) How to balance value given to customers with value received from customers, so that the businesses and their customers profit but not at the expense of the other,

[0083] 6) Where the brand recognition stands in relation to others in the marketplace,

[0084] 7) What efforts will be required to reach the business objectives,

[0085] 8) What are the realistic expectations of the business, in addition to identification of problem areas, opportunities for growth, etc.

[0086] 9) How to run a sustainable business,

[0087] 10) Who are the most profitable customers, what are their relationships worth,

[0088] 11) What is the key source of revenue, and

[0089] 12) How to optimize the key source of revenue to maximize profit flows.

[0090] In one embodiment, to increase Profit Flows, management understands how their relationships as well as strategic marketing works so they can integrate strategic marketing concepts across the Front Office and define the metrics that measure the performance of the business. To determine the root causes that hinder the profitability of the business, management evaluates and understands with specificity the functional responsibility of the Front Office (i.e. Marketing, Sales and Customer Care), and potential actions that can improve the inter-working relationships of functional organizations to improve profitability and reduce risks. Management also understands how these groups are integrated in the Front Office, how the inter-working relationships of functional organizations affect their prospects and customers, and how to use the resources of people, time and money to their best advantage. Additionally, it is beneficial for management to share the strategy and results with everyone in the Front Office, ensure that the Front Office is integrated, further ensure that the outputs of their efforts are accessible and easily understandable, and that the output is organized to quantify, categorize and analyze it to help the performance of the business. The process helps to quickly capitalize on the strength of the business by not only making informed adjustments to the marketing program, but by making strategic, long-term investments.

[0091] To begin to solve the problems, the Front Office organizes around the customer by dividing the major process steps into detailed steps that can be implemented and measured, assigning a value to the detailed steps (or Interactions) and thereby the relationships, modeling strategies in advance of investment, anticipating the metrics, implementing a most promising strategy out of all possible strategies and options, tracking the results, analyzing the results, and developing leading indicator metrics.

The Difficulty of Optimizing the Front Office with Current Approaches

[0092] Without the necessary Business Intelligence, management doesn't use marketing resources effectively and efficiently, doesn't know where to allocate marketing budgets and neglects of the source of profit flow, their customers. It's common for executives to think of marketing as a black hole or for them to moan

that they know that only half of their marketing is working, but that they don't know which half. It is also common for executives to spend much more on acquiring customers than keeping them.

[0093] Management has been stymied in evaluating performance of Front Office marketing strategies for three reasons:

1. The available metrics are typically based on individual tactics in either Marketing, Sales or Customer Care, a symptom that these departments are not working together.

2. Extraneous data has made it difficult to know what is intelligent and actionable and what is not. Systems to capture data have been built by Information Technologists or accountants--not by those experienced in the workings of the Front Office.

3. It has been onerous to capture the necessary implementation detail to back up high level assumptions, resulting in bad intelligence.

<u>A Customer-Centric Solution Needed</u>

How marketing works is not readily understood for three reasons.

1. To understand how marketing works, it is necessary to know how effective customer relationships work. Management has imperfect information since it has focused on what their company is selling rather than on what their customers are buying.

2. With this internal focus, metrics associated with tactical, or operational, efficiency have dominated marketing strategy, management and measurement.

3. Lack of Business Intelligence on building effective customer relationship makes it difficult to quantify relationships to mitigate risk and maximize profit flows.

[0094] Business Intelligence is needed on the cause and effects of customer interactions and on relationship-driven strategy determination and implementation. Quantifying and monetizing the customer relationship are key to maximizing profit flows.

Description of the Solution

[0095] This Marketing Business System (MBS) is designed to deliver the Business Intelligence management needs to build relationships and thereby profit flows.

[0096] The MBS configures a Relationship Tracking System as an Analytical Framework to develop leading indicator metrics baselines including scoring the relative market position of the business and quantifying Front Office strategy and relationship performance.

[0097] The efficacy of a high level Customer LifeCycle Profitability Model for Status Quo and a new marketing strategy developed during the planning process is checked during implementation with lower level Interaction data collected in the Relationship Tracking System. This foundation of lower level data helps to make high level assumptions more reliable in future iterations.

[0098] The datastream from the Relationship Tracking System also makes it possible to capture customer behavior patterns, showing the cause and effect of customer relationships, Interaction by Interaction as well as the pattern punctuated by the major events or milestones in the customer life cycle and finally appending these behavior patterns with Awareness/Satisfaction Research findings to correlate movements.

[0099] How customer relationships work is key to how marketing works. When management knows how it works for their company, they can use their marketing resources more wisely to acquire new customers and strengthen their relationships with their existing customers. Over time, as the marketing formula is refined, management can maximize profit, mitigate risk and hone their business model.

[00100] The primary benefits of the business process to management is guidance in mitigating risk and maximizing profit flows. Higher profitability leads

to greater value in the marketplace. Greater value in the marketplace translates to more shareholders, increased stock value, higher sale value. Higher profitability can be used to build a long-term viable business, give dividends, make acquisitions, pay down debt and do public good. Information from the business process can balance short-term and long-term goals or be stronger in either direction. The information gives management options.

[00101] Secondary benefits are knowing where to focus, setting realistic expectations and attaining an integrated Front Office. The integrated Front Office comes with its own set of ancillary benefits--Marketing, Sales and Customer Care working together, aligned behind a common Marketing Strategy, with everyone owning the customer—and management knowing what everyone does at what cost.

[00102] Long-term benefit is deep knowledge of customers and customers' value that enables a business to differentiate based on exclusive customer relationships.

[00103] From the 19 reports the business process creates there is a plethora of information. Each business has a unique set of circumstances and unique needs for leading indicator metrics to guide management. Evaluating which metrics will really be helpful is done up front. As circumstances change, different metrics are highlighted. The Report Grid summarizes the purpose of the reports and how they contribute to the benefits to be derived from the MBS. The Report Grid also indicates at what stage they are used in the MBS, for establishing the status quo baseline, planning an alternative strategy or evaluating results of strategy implementation. The Report Grid is in Appendix E, E-44 to E-47.

[00104] With this proprietary information, management can hone the business model to mitigate risks and increase profit flows and repeat the business process steps as necessary to improve on the leading indicator metrics to build a database of more proprietary information for future reference.

[00105] Figure 1 is a simplified database architecture diagram of a Marketing Business System (MBS) 10 including a server sub-system 12 and a plurality of client sub-systems 14 connected to server sub-system 12. MBS 10 tracks information and provides a status to users upon request. In one embodiment, client sub-systems 14 are computers including a web browser, such that server sub-system 12 is accessible to client sub-systems 14 via the Internet. Client sub-systems 14 are interconnected to the Internet through many interfaces including a network, such as a local area network (LAN) or a wide area network (WAN), dial-in-connections, cable modems, special high-speed ISDN lines, DSL and T1 lines. Client sub-systems 14 could be any device capable of interconnecting to the Internet including a web-based phone or other web-based connectable equipment. A database server 16 is connected to a centralized the database containing product related information on a variety of products, as described below in greater detail. In one embodiment, the database is stored on database server 16 and can be accessed by potential users at one of client systems 14 by logging onto server system 12 through one of client sub-systems 14. In an alternative embodiment the database is stored remotely from server sub-system 12.

[00106] The MBS utilizes a network-enabled (e.g., Web-enabled) interactive database to automate a Marketing Business System. System 10 captures pertinent information and provides on-line, up-to-date information to the user, whether corporate or individuals, after authentication, upon request. In one exemplary embodiment, system 10 utilizes a database with a client user interface front-end for administration and a network interface for standard user input and reports. Information is accessed in the database through a variety of analytical tools. The MBS is a marketing tool to facilitate Strategic Marketing and Business Intelligence Consulting. The MBS can also be used as a stand alone tool for internal users. System 10 supports various levels of management hierarchy and provides access to individuals based on the position held by the individual within the business entity.

[00107] Figure 2 shows a configuration of database services 80 within an N-Tier Architecture as an alternative approach to the architecture described in Figure 1 and is another embodiment of MBS 10. An N-Tier Architecture allows an

unlimited number of programs to run simultaneously, send information to one another, use different protocols to communicate, and interact concurrently.

[00108] In an exemplary embodiment MBS 10 utilizes a database services 80 to collect and store information on individuals important to the success of the business entity. MBS 10 tracks contact information as well as an ongoing Interaction Record of various ways individuals interact with the business, and how each interaction affects the profitability by quantifying the effort in various ways. The information is sorted into several user interfaces from preliminary to a formal analysis for profiling purposes. The Interaction Record itself is kept in tabular form (instead of the usual running dialogue of contact management systems) so that the record can be quickly read or analyzed. Database services 80 are divided into several sections, which are further divided into a variety of sub-sections to organize and store the data relevant in the analysis and reporting. Various sections within database services 80 are interconnected to update and retrieve the information as required.

[00109] In the embodiment in Figure 2 of an N-Tier Architecture, database services 80 receive data from a variety of data sources 30 and feed data streams 32 to a similar variety of data sources. Users access the searchable database services 80 a variety of ways through a browser on a network 33 or directly from a computer 36. Users input and output data.

[00110] Database services 80 are coupled to several layers within the N-Tier Architecture, which perform specific tasks. All the layers are integrated to provide comprehensive information. Updating information within one section also automatically updates the relevant information in other sections of the database to maintain integrity.

[00111] The first layer that a user 33 or 36 encounters is an authentication layer 40 which determines whether the user is to be granted access and what level of access to database services 80. Users 33 also go through a web services layer 50 which is a necessary interface for those seeking to access database services 80 through a browser. A components layer 60 houses the business rules for specific tasks

including, but not limited to the business rules for access. An application services layer 70 does the process of the business rules, doing the tasks necessary to provide the MBS 10 System and the user with the data formatted or requested. The database services layer collects and houses the data in a variety of analytical formats including, but not limited to lists, spreadsheets, cubes, etc. An administrative services layer 90 provides the utilities and oversight to make the layers work together to provide the data and reports MBS 10 and the user require in pre-determined formats. System 10 is flexible to provide alternative reports and is not constrained to the options set forth above.

[00112] The systems and processes are not limited to the specific embodiments described herein. In addition, components of each system and each process can be practiced independent and separate from other components and processes described herein. Each component and process also can be used in combination with other components and processes.

Overview of Terminology:

[00113] For the purposes of explanation, a brief overview of terminology is provided hereunder:

[00114] 1) Strategic Brand Readiness (SBR) Factor

[00115] The SBR factor is a method to more accurately portray value and mitigate risk posed by external and internal brand readiness issues. The SBR factor allows the business to reflect relative market position as a planning tool.

[00116] Typically Net Present Value (NPV) assigns a risk factor at a flat percentage, usually the same figure as the current interest rate, so if the interest is 10%, then risk is 10% and the NPV factor is 20% for the first year. The SBR factor goes beyond NPV and adjusts anticipated profit upwards for brands that are ready and have a favorable market situation and adjusts anticipated profit below the value of the flat percentage for brands that aren't ready and that are facing a more uncertain market situation. The SBR factor range is + or - 10%. Typically the NPV risk flat

percentages are 10%. The SBR factor fluctuates to show aftereffects of programs put into place in year one.

[00117] The overall SBR factor includes two parts. One part includes six categories and evaluates the external market situation. The other part includes an additional six categories and evaluates what can be done or is being done to affect it. There are 100 possible points spread among the categories that matter in an Acquisition phase, a different set of 100 in a Closing phase and still a different set of 100 in a Retention phase. The SBR factor value is portioned 20% to the Acquisition phase, 30% to the Closing phase and 50% to the Retention phase to reflect a typical breakout of new to repeat business and to arrive at a final SBR factor in the range of + or - 10%. Included within the 12 possible categories are 70 individual items in total. The value can be different in each phase and a full value is preset. Each item has 5 possible choices for scoring and a relative value: 1, 0.5, 0, -0.5, and -1. The score is figured by multiplying 1, 0.5, 0, -0.5, and -1 times the full value of the item. The sum of the relative value of all the items in a category as scored determines the value that category contributes to the SBR factor for each of the phases. The objective of undertaking SBR analysis is to arrive at a factor unique to the specific business situation that the business can utilize to make future forecasts.

[00118] The full value preset for the items and the categories can be changed for every industry or product service offering. Even different categories and items can be created and have different full values preset. For example, in some industries, innovation may have more impact than in others and therefore be assigned a higher value. The process requires the user to be consistent once the values are assigned and use the same values in comparing strategies from year to year. The SBR factor scoring potential averages the opinions of a panel of subject matter experts as a starting point for preset values.

[00119] Remedies can be directed to the category overall or to an item within the category. (Example: "Must Haves" is a category. Quality is an item under that. Excellent quality is worth a 1; good, 0.5; poor, no value; questionable, -0.5; and unknown, -1. There are 7 items under the "Must Haves" category and each

will be rated and counted in the category value.) The business may make investments to increase the value. Investments may include, for example, changing manufacturing processes to improve quality, adding human resources to improve the track record in an area, lowering prices to increase market share or customer share, investing in technology to make the product more integral to the customer's business adding more financial resources to Travel & Entertainment budget for aggressive, networking, investing in a privacy program to increase the trust factor, or initiating a long-term public relations program to change the reputation.

[00120] 2) Customer LifeCycle Profitability Model

[00121] The Customer Lifecycle Profitability Model takes a snapshot of a customers' entire life cycle to give a comprehensive view of their value, given a particular set of circumstances and assumptions. The model is used for each of a variety of strategies and best and worse case scenarios, starting with the status quo, to compare the value of one strategy to another in advance of investment and to maximize profit flows.

[00122] The Customer LifeCycle Profitability Model supplemented by an Interaction ROI Model is used to help quantify Front Office strategy and relationship performance to compare past performance with assumptions about anticipated future performance and actual future performance.

[00123] To provide information for the model, management completes a Customer LifeCycle Profitability Model Template (Shown in Appendix E, pages E-5 through E-7) for Status Quo best and worst case scenarios and two alternative Marketing Strategies with best and worst case scenarios. The information includes Front Office and financial data as well as the appropriate SBR Factor and management's assumptions for performance given the various strategies.

[00124] The Customer LifeCycle Profitability Model presents the results for comparison in the Customer LifeCycle Profitability Model Alternative Strategies Scenario Comparison, organized by Status Quo Best and Worst Case, then

Alternative #1 Best and Worst Case, followed by Alternative #2 Best and Worst Case. Once management commits to a particular strategy and before implementation of that strategy, the Customer LifeCycle Profitability Model is double checked by looking at tactical requirements and assumptions in more detail in a Planning Mode Interaction ROI (I ROI) model that mirrors the format of the data that will come from the tracking system. Adjustments are made in the new marketing strategy Customer LifeCycle Profitability Model as needed. The combination of the anticipated metrics in the Customer LifeCycle Profitability Model and the I ROI Models form the baseline for future analysis of success in implementation.

[00125] Upon implementation, data from the tracking system feeds a Tracking Mode I ROI model which is the basis for a series of management reports yielding leading indicator metrics that allow for informed, focused adjustments to maximize profit and to be more effective in building relationships.

[00126] One of the management reports is a Customer LifeCycle Profitability Model Summary Report. The I ROI Model provides data to the Customer LifeCycle Profitability Model which runs this report. The report is used to evaluate the actual success of the chosen strategy compared to plan and status quo. It summarizes key assumptions leading to forecast. It compares anticipated long-term profitability of an individual customer and the business overall, adjusted to reflect the risk and the value of future dollars, and the cost in up front financial commitment.

[00127] The Customer LifeCycle Profitability Model value is derived by (1) looking at all the ways revenue comes in—from existing customers, new customers without referral, referred customers, and repeat business multiplied by the average yearly sale; (2) accounting for all the costs in detail for the Back Office and Front Office including direct costs (incremental and fixed), investments in infrastructure and Brand Readiness; and (3) using the SBR factor to more accurately portray value and risk than can be done using Net Present Value (NPV) discounts alone. The cumulative NPV profit shows the profit anticipated for the entire customer base. Customer Lifetime Value profit reduces it to the individual customer to show the net present value of future profits to be received from the average customer gained

in year one over a period of several years. Customer Lifetime Value is typically used to justify discrete investments or separate Marketing, Sales, or Customer Care programs, and not to justify an Integrated Market Action Program (IMAP) that serves the entire Front Office as does this process.

[00128] In fact, business can develop an even more comprehensive Customer LifeCycle Profitability Model by accounting for multiple Sales Channels, products/services and pricing structures, marketing programs for alternative Acquisition and Retention strategies operating simultaneously or primary as well as secondary relationships. For example, the business can anticipate how investments in programs with non-customer groups, such as partners, analysts, employees, referral sources, and internal and external influencers, could change results with customer groups. Similarly, the business can develop a less comprehensive Customer LifeCycle Profitability Model by evaluating the effect of only one element compared to the status quo, for example, the effect of adding technology to change infrastructure.

[00129] The Customer LifeCycle Profitability Model can also be developed by evaluating the impact of segregating the business into various smaller business divisions, brands, and geographic contingencies. The Customer LifeCycle Profitability Model can be further segmented into customers by product family, industries, sources, various rating schemes, and more. The Customer LifeCycle Profitability Model is adaptable to any accounting system. The model can use net profit or gross profit or use overhead costs to get to average profit instead of marginal profit with all related investment costs added. The usefulness of the model is dependent, at least in part, on consistency.

[00130] 3) Customer Segmentation

[00131] In one embodiment, to meet business objectives while increasing profit flows, a business focuses on customers that are already profitable customers or are otherwise priority customers. In an alternative embodiment, a business focuses on customers that are already the business' most profitable customers or are otherwise top priority customers. The business also focuses on prospective

customers who have similar profiles to top priority customers. The prospective customers are referred to as prospects. Because profit is more likely to flow from satisfied customers, the business process encourages businesses to focus on creating customers for life. For example, extremely satisfied customers are more likely to be repeat customers, increase the amount they purchase or purchase new offerings more easily, eliminating the cost of Acquisition and lowering the cost of Closing. Extremely satisfied customers are also more likely to refer new customers, lowering Acquisition costs.

[00132] The priority customers for each business will be defined differently. Several factors that are considered by businesses in identifying and focusing on priority customers include, but are not limited to, profit, large purchase volume, good cash flow, promptness in paying, prestigious customers, or key customers in a new industry or geographic location.

[00133] The businesses take advantage of currently available cross tab analysis, Recency/Frequency/Monetary (RFM) transactional analysis, neural networks and other techniques to segment the most profitable (or otherwise priority) customers and to find other potentially profitable (or otherwise priority) customers within their customer base and in the marketplace in general.

[00134] 4) Targeting Research

[00135] Targeting Research is customer-centric research that goes beyond product- or company-centric research to drill down deep enough to know why people do what they do, or what they are likely to do. Targeting Research uncovers nuances used to differentiate products or services in the marketplace and increase the likelihood that the customer will respond to the Integrated Market Action Program (IMAP).

[00136] The main reasons for undertaking Targeting Research are to confirm the market situation, validate viability of business objectives and customer segmentation, and determine the offering's appeal to potential top priority customers.

Its results can help redefine what is being sold, why anyone cares, and who cares the most. Positioned correctly, targeting research can develop initial prospects and influencers for the business.

[00137] There are a couple of approaches, depending upon the number of prospects and customers and the number of customer segments in the overall target market.

[00138] For less than 100 prospects and customers in the overall target market, the business has an outside resource that calls upon approximately 25 people for in-depth one-on-one thorough telephone interviews, transcribes the interviews and analyzes these interviews.

[00139] For more than 100 prospects and customers in the overall target market, the business has an outside resource that interviews approximately 12 people in-depth to obtain the issues, then conducts more extensive discussions to validate the issues and identify nuances. If there are a number of distinctly different customer segments, the outside resource will interview with more customers in-depth, up front. The process continues depending on the overall size of the target market and the number of segments, until approximately 100 to 500 people are surveyed in depth. The business utilizes an outside resource to analyze the survey data using cross-tabulations that look at how different segments of the prospects or customers answered the questions. For example, women versus men, more profitable customers versus less profitable customers, the people with one set of products versus another and so on. From these results, the businesses build a profile of their best prospects and best customers so that the businesses can appeal to them more directly.

[00140] 5) Targeting Research Options

[00141] While cross-tabulation analysis is adequate for most Targeting Research assignments, there is an occasional need for conjoint analysis. Under conjoint analysis, prospects or customers are given a series of options to rank with the goal of determining the optimal offering. Results of this analysis form the

basis of a market model that can be reused as the offering evolves. Similarly, decision analysis models can be built to help prioritize offerings and/or projects.

[00142] On occasion a focus group may be used to clarify an issue. If the product/service needs to be demonstrated, a series of focus groups can be invaluable. If the product/service can be self-demonstrated, a self-administered survey is another option.

[00143] 6) Front Office Process including Acquisition, Closing & Retention

[00144] The Front Office Process refers to a process for managing a Front Office that works well for the customer and the business. Understanding how it works, or how it should work, is beneficial to understanding any problems that should be solved to market to priority customers to increase profitability.

[00145] To work for the customer, it is beneficial for the people in the Front Office to work together to provide a seamless experience for the customer, from what is promised to what is delivered. In this business process, the Front Office is integrated without destroying the separate tactical functions of Marketing, Sales and Customer Care. Instead the distinct and different skills of the people in Marketing, Sales and Customer Care are focused on what they do best with clear handoffs between the functions and appropriate collaboration to work with the customer.

[00146] In the business process, the Front Office is organized around customers (and prospective customers or prospects) and their experiences regarding the Acquisition/ the Closing/ and the Retention (A/C/R) Phases. Marketing is charged with the Acquisition and hands off to Sales once a prospect becomes promising. Sales is responsible for Closing and handing the prospect off to Customer Care once the prospect becomes a customer. The hand off to Customer Care is an extended period since the purchase is arranged, but the customer has not received the purchase. Sales stays intimately involved to make sure the customer gets what has been promised and that introductions to Customer Care go smoothly. The Sales and Customer Care Staff

form a customer relationship team and are activated again for repurchases. During the period between purchase and repurchase, Customer Care handles Retention activities. In fact, in the Customer LifeCycle Profitability Model and in the Interaction ROI (I ROI) Model, the Closing is segregated as Closing (Initial) and Closing (Repeat) to explore both metrics. To help evaluate the Retention Value, the Customer Maintenance Level is scored for inclusion on the Knowledge Screen Relationship Value (Figure 53) drawing on customer service/technical support records.

[00147] The A/C/R Phases are further divided into CELs (Contact Evolution Levels) and how the process works now is looked at from the CEL perspective using the CEL framework to see what changes would need to be made to integrate the functional areas. What it takes for a contact to be in or achieve a CEL Level is defined for the business at this point. If the Front Office process is working well, the business gains by having the Front Office aligned behind one Marketing Strategy and by having the proper level of awareness, leads and satisfaction to keep suspects (a phase before the potential customer is classified as a prospective customer), prospects and customers flowing through the A/C/R Phases and corresponding CELs. Looking at awareness, leads and satisfaction or the lack thereof, is another way of defining the problems to be solved. In fact, a SWOT (Strengths, Weakness, Opportunities, and Threats) analysis on all aspects of the Front Office process is performed to understand the process strengths and weaknesses. The key issues involved in SWOT analysis relates to the process itself, (i.e. what does it take to move people from one CEL to another), how customers are affected by the process (i.e. what the business promises, delivers and the business' reputation in the selling environment) and what the business gains from having conducted the process (i.e. awareness, leads, satisfaction).

[00148] 7) Strategic Positioning

[00149] Strategic Positioning is the bridge between a business and its customers. Strategic Positioning ensures there is not a disconnect between the business' overall strategic plan and its customers' experience, including their expectations or acceptance of the business' place in a competitive marketplace.

[00150] Strategic Positioning is the foundation of Marketing Strategy. It is expressed as a Strategic Positioning Statement and as a Promotional Positioning Line. It is augmented by Key Messages and Supporting Facts. It does not necessarily include the Value Proposition, defined as the delivery of the major benefit.

[00151] Strategic Positioning analysis draws on the strategic plan of the business, the knowledge gained from Targeting Research and competitive research. The analysis determines what the marketing openings are, or are not, by overlaying on management's perspective of the business' Value Proposition and its Key Messages, the perspective of its customers and the competition. The Strategic Positioning analysis optimizes the marketing opening a business may have by showing where it is going to be easier to be heard, where a perception may need to be changed, and what is going to take a larger effort to achieve, if it can be done at all.

[00152] The Value Proposition is the reason that management thinks the customer should value its offering and is the most likely reason customers stay, but not necessarily the reason they become customers.

[00153] A Strategic Positioning Statement summarizes what the business is, what it stands for, what it has to offer, to whom and why they should care (the major appeal of the offering). The Strategic Positioning Statement further summarizes the differences between the business and its competitors.

[00154] A Promotional Positioning Line highlights what is most likely to appeal to the customer about the offering.

[00155] Key Messages build upon the Promotional Positioning Line and add other pertinent information including information that may lead the customer to understand the Value Proposition. Over time, the Value Proposition can become the reason customers become long time customers, if, in fact, it was not the reason to begin with. Supporting facts lend credibility and proof of performance.

[00156] 8) Marketing Strategy

[00157] Marketing Strategy flows from Strategic Positioning to balance risk and profit with the market situation, the capability of the business, its resources, and its objectives. Strategic Positioning links a business to its customers. In fact, it is the customer relationship that drives Marketing Strategy in this business process. A relationship with a customer is built one interaction or experience at a time. Because the cause and effects of customer interactions are not well understood, marketing has been difficult to justify or hold accountable. Quantifying and monetizing the customer relationship are key to increasing profit flows. In identifying alternative marketing strategies, the business process places greater importance on the interactions with customers (and prospective customers) than other aspects of marketing.

[00158] While interactions with the customer drives Marketing Strategy in this business process, pricing, distribution, and the offer are not ignored. They are aligned with the relationship aspect and support the Strategic Positioning. Assumptions of the affects of alternative pricing, sales channel choices and product configurations (including customer service and technical support) on revenue and costs are summarized in the Customer LifeCyle Profitability Model and in the Interaction ROI Model.

[00159] Figure 3 is an exemplary embodiment of a flow chart 98 detailing a process 100 to quantify marketing status quo. Marketing status quo refers to a present condition of a business from a marketing perspective. Process 100 is typically started 110 by establishing a base line, which can later be compared to determine the actual progress made in a business's profitability. Process 100 generates reliable results when there is an understanding of management perspective 112 through face to face meetings and round table discussions. Based on the acquired information, Strategic Brand Readiness (SBR) Factor is determined 114 and Leading Indicator Metrics are documented 116. Based on the information received 118 from the Front Office and Financial Performance data 118 of the business, a Status Quo Customer LifeCycle Profitability Model report is run 120 to anticipate long term profitability. Leading indicator metrics are also documented based on the Customer

LifeCycle Profitability Model report. The metrics and the Customer LifeCycle Profitability Model report form the base line which is later compared against future data after newly revised strategies are implemented to understand the effectiveness.

[00160] Figure 4 is a flow chart detailing a revised process 140 that reduces the risks and increases profit flow for the business. Process 140 includes Analyzing 142 New Marketing Opportunity, Quantifying 144 Alternative Marketing Strategies, Identifying 146 New Marketing Strategy, Refining 148 New Marketing Strategy, Preparing 150 for Implementation, Implementation 152, Analyzing 154 Results of New Marketing Strategy, Establishing 156 Leading Indicator Metrics, and Documenting 158 Benefits and Making Recommendations to Management based on analysis of results to hone the Business model to mitigate risks and maximize profits.

[00161] Figure 5 is a flow chart 170 detailing the step of Analyzing 142 New Marketing Opportunity (shown in Figure 4). Analyzing 142 New Marketing Opportunity includes understanding 172 management perspective through face-to-face meetings and round table discussions and prioritizing 174 customer segments. Business objectives are adjusted 176 to address top priority customers and targeting 178 research to identify a specific group of customers is undertaken. Analyzing 180 differences between management and customer expectations, profiling 182 top priority customers, and analyzing 184 Front Office process of the business help identify issues in meeting business objectives and customer expectations. Once the issues are identified, the issues are prioritized that have been determined to be important in meeting business objectives and customer expectations. If applicable, business objectives are revised 188.

[00162] Figure 6 is an exemplary embodiment of a flow chart 200 detailing the steps of Quantifying 144 Alternative Marketing Strategies and Identifying 146 New Marketing Strategy (shown in Figure 4). Quantifying 144 Alternative Marketing Strategies requires developing 202 preliminary strategic positioning, identifying 204 alternative marketing strategies, and computing 206 a new SBR factor together with documenting leading indicator metrics. Tactical requirements are estimated 208 with possible strategic outcomes for each specific

marketing strategy. The user anticipates long-term profitability of alternative marketing strategies after analyzing the results obtained from a Customer LifeCycle Profitability Model Report 210. To identify 146 a New Marketing Strategy, the user compares 212 new Customer LifeCycle Profitability Model report against the Status Quo Customer LifeCycle Profitability Model report and analyzes 214 the results for an optimum condition. If the results are optimum, a most promising marketing strategy is identified 216. If the results are not optimum, the user may repeat 202 through 214 to provide optimum results.

[00163] Figure 7 is an exemplary embodiment of a flow chart 230 detailing Refining 148 New Marketing Strategy (shown in Figure 4). Refining 148 New Marketing Strategy includes fine tuning 232 strategic positioning and detailing 234 tactical requirements as it relates to a new marketing strategy. Planning mode interaction ROI report is run 236. Simultaneously, tactical outcomes and assumptions are checked for accuracy and leading indicator metrics are documented. Based on the revised information, Customer LifeCycle Profitability Model report is run again 238 to validate assumptions. To Refine 148 New Marketing Strategy, the user compares 240 new Customer LifeCycle Profitability Model report against the Status Quo Customer LifeCycle Profitability Model report and analyzes 242 the results for an optimum condition. If the results are optimum, an Integrated Market Action Program (IMAP) Plan is documented 244. A sample of an IMAP Plan outline is attached herewith in Appendix - A. If the results are not optimum, the user may repeat 232 through 242 to provide optimum results.

[00164] Figure 8 is an exemplary embodiment of a flow chart 260 detailing Preparing 150 For Implementation, Implementation 152, and Analyzing 154 Results of New Marketing strategy (shown in Figure 4). Preparing 150 For Implementation includes producing 262 promotional/relationship enhancement tactics, establishing 264 priority customer profiles and establishing and documenting 266 Relationship Tracking (RT) system. Once 262, 264 and 266 are completed, the individual responsible for the front office trains 268 front office personnel for implementation 152. During part of implementation 152, IMAP is initiated 270,

customer profiles in RT system are built, data is collected and results pertaining to implementation are tracked 272. Analyzing 154 Results of New Marketing strategy includes initiating and completing 274 through 280 (described below). A Tracking Mode Interaction ROI model report is run 274 to confirm tactical outcomes and document leading indicator metrics. Information, such as Front Office data, financial data and SBR factor is obtained 276 and customer profile data is mined and analyzed 278. In addition, a new Customer LifeCycle Profitability Model report is run 280 to confirm long-term profitability of the new marketing strategy. Leading indicator metrics are also documented.

[00165] Figure 9 is an exemplary embodiment of a flow chart 290 detailing Establishing 156 Leading Indicator Metrics and Documenting 158 Benefits and Making Recommendations to management. Leading Indicator Metrics are established 156 by running reports and comparing 292 actual metrics to plan metrics as well as status quo metrics. A new SBR factor is extrapolated 294. Benefits are documents 158 and Recommendations are made to management by analyzing 296 results and identifying recommendations to reduce risks and increase profits. The business process is repeated 298 to improve, reaching an increasingly more acceptable and effective solution.

[00166] Figures 10 through 62 describe one embodiment of MBS 10 (shown in Figure 1) and explains how to track various data utilizing a database for accumulating information on individuals important to the success of the business entity. MBS 10 tracks deep contact information as well as an ongoing Interaction Record of various ways individuals within the business entity interact, how they react to various issues and interactions, how their behavior affects profitability by quantifying the effort and preparing reports. The information collected is sorted into several Knowledge screens preliminary to a formal analysis for deep profiling purposes. The Interaction Record itself is kept in tabular form (instead of the usual running dialogue of contact management systems) so it can be quickly reviewed and/or analyzed. Since MBS 10 is a network-based tool, everyone within the business entity can access the same records based on the authorization level granted by the

management. These records are the same records used by telemarketers, if that part of the MBS function is outsourced to an outside marketing group.

Configuring the RT System as an Analytical Framework to Build Profiles, Track Results & Develop Leading Indicator Metrics Baselines:

[00167] For MBS 10 system to function effectively, MBS 10 is configured as an Analytical Framework by management personnel and a system administrator responsible for implementing the system. The configuration process includes configuring the relationship to build profiles and track results. The configuration process further includes establishing leading indicator metrics baselines.

[00168] a) Configuring the Relationships to Build Profiles

[00169] Building profiles starts with the definition of a targeted customer, such as a top priority customer. To build deep knowledge of the targeted customer, management attempts to obtain more than normal contact information. Screens to capture information about the contact's relationships and personal data as well as company data are created. Positions for potential answers to questions to be asked of contacts are organized in Knowledge screens. Information residing in the database is captured as initial information. The initial information flows into analysis formats, such as cross tabulation formats, multidimensional spreadsheets, or special database queries, and is used to generate reports useful for addressing management issues.

[00170] Figure 10 is an exemplary embodiment of a flow chart 310 depicting a process of building profiles. To build profiles, information about the contact's relationships and personal data as well as the company data is obtained. Responses to questions asked to the contact are organized in Knowledge screens. Database information is appended as well. By appending results of existing and ongoing awareness and satisfaction market research to the data stored about the contact in database services, the database information can be used to predict how

individuals (i.e. contacts) are likely to react which allows for more accurate forecasting.

[00171] First, a level of complexity for contact profiles is determined 312. This determination includes determining information available in databases and what is expected over time from the contact personally. The collected information is organized into Company Data, Personal Data and Relationship screens. Scripts, questionnaires, and surveys are prepared 314 for use in each Acquisition/Closing/Retention (A/C/R) Phase to elicit the information to be derived from the contact and/or to be verified by the contact. Information from the databases, the scripts, questionnaires and surveys is organized 316 into Knowledge screens including Relationship Value, Products/Services, Company Information and Business Intelligence. Existing information is accommodated 318, additional information is anticipated and collected to set up business intelligence Knowledge screens. In addition, a segment is set-up within database services to store the information relating to the Business Intelligence Knowledge screen. A link to awareness and satisfaction research results is established, either to match the customer segment of the contact or to reflect the individual's opinion. Links to a Web site may be included, as well as scanning and club card data, for example, on a customer segment or individual basis.

[00172] b) Configuring the Relationships to Collect Data, Track Results & Generate Reports

[00173] Collecting Data includes collecting customer and prospective customer data as well as data pertaining to all contacts important to a business' success, such as partners, analysts, employees, referral sources, internal and external influences, and others.

[00174] Tracking Results includes tracking the entire customer relationship through Acquisition/Closing/Retention Phases, broken down into details of every Interaction with the contact and the responses recorded. In one embodiment, every Interaction is quantified by the relative value of the Interaction and by incremental cost and is added to the relationship profiles determined in Figure 10.

[00175] Figure 11 illustrates a Contact Evolution Levels (CELs) visual chart 320 showing the various contact levels. Each level is provided with a point value and each contact is provided with a number that includes a whole number followed by a decimal number. The decimal number indicates the amount of effort it has taken to move the contact within its present level to date. Chart 320 is a visual interpretation of how an Integrated Market Action Program (IMAP) through its Promise, Buzz and Delivery transforms a contact from someone in the Target Market who has never heard of the Company, or is Cold, into a customer who thinks of herself as a Partner of the Company and is helping the Company build its Brand. The more the contact is transformed and evolves through the Contact Evolution Levels or CELs, the more valuable the Brand and the greater the Brand Equity, Customer Share and Market Share for Company. These CEL levels also track with the Acquisition/Closing/Retention (A/C/R) Phases as described below in more detail.

[00176] The first CEL is Out of Play 322 which is given a point value of 0.0. Contacts at this level cannot be reached, refused permission to be marketed to, and/or has declined to be a customer any longer. The next three CELs form the Acquisition Phase and contacts in these CELs are termed Suspects. The first Acquisition CEL is Cold 324 which is given a point value of 1.0. Cold 324 contacts represent the target market and they are typically unexposed to current offerings. The next Acquisition CEL is Cool 326 which is given a point value of 2.0. Cool 326 contacts receive promotional materials and are generally more receptive to the company's offerings. The last Acquisition CEL is Warm 328 which is given a point value of 3.0. Warm 328 contacts agree to be placed on an email list and/or provides influencer names. They have also given their permission to be marketed to.

[00177] The next three CELs form the Closing Phase and contacts in these CELs are termed Prospects until the sale is closed. The first Closing CEL is Hot 330 which is given a point value of 4.0. Hot 330 contacts agree to appointments since they generally would think about using the company's offering. The next Closing CEL is Hotter 332 which is given a point value of 5.0. Hotter contacts want a contract and they would like to acquire the company's offering. The final Closing CEL is

Closed Sale 334 which is given a point value of 6.0. Closed contact 334 signs a contract for the company's offering.

[00178] The next six CELs form the Retention Phase and contacts in these CELs are termed customers. The first Retention CEL is Expectant Customer 336 which is given a point value of 7.0. Expectant Customers 336 are ready to receive offerings and the time frame is after hand over from sales to customer retention. The next Retention CEL is Trial 338 which is given a point value of 8.0. Trial 338 receive status reports and they are generally waiting to see what happens. The next Retention CEL is Likes 340 which is given a point value of 9.0. Likes 340 contacts do not complain and they accept the company's offering as it is. Contacts in Likes 340 CEL will not send the company's offering back to the company although this option may not be at the choice of the contact since they may either be locked in or have no other alternative. The next Retention CEL is Loyal 342 which is given a point value of 10.0. Loyal 342 contacts renew contracts and does so repeatedly. The next Retention CEL is Prefer 344 which is given a point value of 11.0. Prefer 344 contacts give references to the company and refer potential customers to the company. Prefer 344 contacts want to stay customers of the company and it would take an extreme situation to change their opinions. The next Retention CEL is Partner 346, which is given a point value of 12.0. Partner 346 contacts actively refer business to the company and under current conditions will pay a premium to have the company's offerings. In some instances, Partner 346 contacts even evangelizes with others and is an advocate of the company.

[00179] The final CEL is unhappy 348 which is given a point value of 13.0. Unhappy 348 contacts bad mouths the company and complains about the company. Contacts in this CEL are waiting for an opportunity to leave the company.

[00180] The CELs provide a convenient and effective method of tracking a contact through its evolution with the company and provides guidance with respect ot how to target customers in each level. How the CELS are defined can be different for each business and are defined during an analysis of the Front Office Process (Figure 6).

[00181] Another aspect of MBS 10 is a tactics plan overview 350 as illustrated in Figure 12. Tactics plan overview 350 is separated into Acquisition/Closing/Retention (A/C/R) Phases. Within each A/C/R Phase how the planned tactics flow from one to another is drawn. Where the tactic might lead to another A/C/R Phase, it is indicated by an arrow drawn to a box listing the A/C/R Phase and the number of the tactic within that A/C/R Phase. (These numbers correspond to the Tactic Codes shown on the Interaction System (IS) Flow (see below).

[00182] As the interactions with a contact progresses, there can be numerous hand-offs between A/C/R Phases. Some tactics within an A/C/R Phase do not have a direct link to other tactics, but instead provide a baseline on Interactions with the contact, building the relationship and brand readiness.

[00183] The exemplary embodiment illustrated in Figure 12 is for a company having one sales channel, one service offering, and one primary relationship. Ancillary programs for secondary relationships are shown as individual boxes. For example, Event Box 352 is Retention 354 is an Influencer Program. The business process can accommodate multiple channels, offerings and relationships by breaking up more complex situations into building blocks as illustrated. An appropriate tactics plan overview is created for every company, shaped by the marketing strategy it seeks to help implement.

[00184] Figure 13 illustrates a tactics grid 360 that lists a number of tactics, which can be manifest in a variety of interactions. Where an "X" is placed in a column, the Promotional/Relationship Enhancement (P/RE) Tactics and Personal Interaction (PI) Tactics category is considered Fit or appropriate for that A/C/R Phase. Examples of how categories can be broken down includes breaking the Ongoing Thank You category into thank you notes, thank you email, thank you call, and others. Custom interactions include, in the exemplary embodiment, meetings, scheduling meetings, fact finding, conference calls, proposals, contract, and others. How the tactic categories are manifest can be different for each company.

[00185] Figure 14 illustrates a Relative Interaction Value (RIV) Number Grid 370 to be used as a guide to set a value on all Interactions a business has with contacts to allow comparison of disparate Interactions. When all, or at least most, Interactions have a numeric value, the potential to improve the profitability through substitution of lower cost Interactions for higher cost Interactions exist, assuming the RIV number is comparable.

[00186] RIV Number Grid 370 builds on Tactics Grid 360 placing a maximum, common, numeric value on each Promotional/Relationship Enhancement (P/RE) and Personal Interaction (PI) Tactic category. Of all the Interactions the tactic category can be broken down into, no Interaction has a value higher than the maximum for the tactic category. Extraordinary events such as a customer referring someone else, offering a testimonial or expanding purchases are defined and valued uniquely for each company to arrive at a common RIV Number. The RIV number includes Relationship Enhancement (RE) and Importance (Impt.) characteristics in terms of the tactic category's probable effect on the contact.

[00187] RIV Number Grid 370 can be customized for a specific industry or company to reflect the different values their customers may place on Interactions or to add new Interactions. For example, in some industries a personal phone call is the only way to get a person's attention and in others only email will do. The process is most accurate if users are consistent once the values are assigned and use the same value in comparing Interactions from year to year. RIV Number Grid 370 utilizes averaging opinions of a panel of subject matter experts as a starting point for present values.

[00188] Figure 15 is an exemplary embodiment of a flow chart 380 depicting a process of configuring MBS 10 to collect data, track results and generate reports. Initially, Management or a consultant designee defines 382 what constitutes movement from one CEL to another CEL. The A/C/R Phases and CELs are described above with respect to Figure 11. Defining 382 what constitutes movement from one CEL to another also helps define roles in the Front Office. Next, management plans 384 the tactics that will encourage the movement from one CEL to another as

illustrated in Tactics Plan Overview (shown in Figure 12). A guide for the appropriate tactics to use in each CEL is encapsulated in Tactics Grid 360 (Shown in Figure 13) which applies generally, although it can be customized for a company or industry. Planning 384 the tactics also helps integrate the Front Office and helps evaluate the profitability of alternative Marketing Strategies. After completion of planning 384 the tactics, management attempts to anticipate 386 Interactions and develop 388 details. Developing 388 details include outlining tactics that can be described in small interactions and the possible responses to these interactions. Tactics, description of each tactic, an assigned CEL Number, and an Incremental Costs associated with each tactic is outlined in an exemplary embodiment of an Interaction System (IS) Flow for the XYZ Company example (Appendix - B). Within the IS Flow, all the Interactions or responses are valued using Activity Based Costing techniques and a proprietary Relative Interaction Value (RIV) Number. RIV Number Grid 370 (shown in Figure 14) sets a value on interactions a business has with contacts.

[00189] The flow from one Interaction to another is also valued by noting movement from one CEL to another when it occurs as defined in the first step. Anticipating 386 interactions helps confirm the profitability of the most desirable new Marketing Strategy and helps track the profitability in real time. In one embodiment, once the data is accumulated in database of MBS 10, every interaction and response with every contact throughout the entire relationship through A/C/R Phases is recorded in tabular form. By allowing the user to select from a list of preset Interactions and responses, MBS 10 transforms the business relationship and interactions into a quantifiable, standardized Interaction record that can be evaluated by the management.

[00190] In planning and anticipating 390 reports, management or a consultant designee anticipate the reports needed and label report formats in the RT System to match the detailed data to be collected in profiles including the Interaction Record.

[00191] Much effort is expended to anticipate the variety of ways that management will want to query the database to collect the appropriate data. The

most likely ways that management will want to segment or aggregate data sets are included in a series of reports of formatted database queries, specifically Deposition of Contacts Summary Reports and Top Priority Customer Profile Reports (Figure 61). Additionally, where it is believed that management will want to look at underlying data (Drill Down button), aggregate data sets (Merge button), or segment data sets (Slice 'N' Dice button) is anticipated and built into the Analytical Framework. This ability is enabled as appropriate with each report as illustrated in Appendix E. Any of these segmentation or aggregation sequences can be deployed before using one or more of the models described in Appendix D to focus the models on the top priority customers or other areas of interest to management.

[00192] c) Establishing Leading Indicator Metrics Baselines:

[00193] c1) A baseline for scoring the business's relative market position:

[00194] The Strategic Brand Readiness (SBR) Factor is used to score a business' relative market position and to quantify the risk created by external and internal brand readiness issues. The SBR Factor is then used in financial projections to modify the risk. In an exemplary embodiment, the SBR factor is computed for Status Quo, (Figure 3) which reflects the current condition. The SBR factor is completed after a new marketing strategy is developed (Figure 6) but before its implementation. In addition, the SBR factor is computed after the new marketing strategy has been implemented and in operation for at least a year.

[00195] To arrive at the SBR Factor, management assigns a score to the present condition of the business after analyzing twelve categories. The twelve categories include six External categories and six Internal categories, broken out by a Year One, a Year Two and a Year Three. The risks or benefits that are likely to occur or materialize in the next two years are also taken into consideration when the scores are assigned. The SBR factor process is again computed later on to determine the SBR Factor for the plan. The SBR factor for the plan is based on the New Marketing Strategy over a three-year period. Once the new marketing strategy has been

implemented, an actual SBR Factor is computed (Figure 9) which includes the actual results of the first year and the projected results for the two succeeding years. Appendix - C includes the SBR Factor calculation for the XYZ Company example utilized by management in developing the SBR factor for status quo and planned.

[00196] c2) A baseline for quantifying Front Office strategy and relationship

[00197] performance:

[00198] The RT System is configured as an Analytical Framework to quantify Front Office strategy and relationship performance. The Analytical Framework compares past performance with anticipated future performance of strategy implementation in a Customer LifeCycle Profitability Model supplemented by an Interaction ROI Model. These models encompass the customers' entire life cycle and then track success in implementation against assumptions. The Analytical Framework also includes the ability to capture patterns of customer behavior precipitating an analysis of the cause and effect of relationships on profitability.

[00199] A series of management reports derived from the Analytical Framework yield leading indicator metrics that allow management to make more informed, focused adjustments to maximize profit and to be more effective in building relationships. These reports can be focused on the segmented or aggregated data sets of most interest to management.

[00200] In an exemplary embodiment, a Status Quo Customer LifeCycle Profitability Model is run (Figure 3), which reflects the current condition and what is likely to happen if nothing changes in the marketing program over the next three years. The model is built with Front Office and financial data as well as the appropriate SBR Factor. It anticipates the long-term profitability of the current marketing strategy, considering best and worst case scenarios and documents leading indicator metrics.

[00201] Later in the planning process, another series of models are run (Figure 6) to anticipate the long-term profitability of alternative marketing strategies, looking at best and worst case scenarios and comparing anticipated results and metrics against the status quo model over the next three years. Once a most promising new marketing strategy is chosen, the Customer LifeCycle Profitability Model associated with it is double checked by looking at tactical requirements and assumptions in more detail (Figure 7) in a Planning Mode Interaction ROI (I ROI). Adjustments are made in the new marketing strategy Customer LifeCycle Profitability Model as desired. The combination of the anticipated metrics in the Customer LifeCycle Profitability Model and I ROI Model form the baseline for future analysis of success in implementation.

[00202] Upon implementation, data from the tracking system feeds a Tracking Mode I ROI model (Figure 8) which in turn flows to the Customer LifeCycle Profitability Model for comparison with what was anticipated in plan and the old status quo for year one. Adjustments are made to anticipate a new forecast for years two and three.

[00203] Appendix - D includes the status quo and alternative marketing strategies Customer LifeCycle Profitability Model for the XYZ Company example, summarized in a Customer LifeCycle Profitability Model Alternative Strategies Comparison. In the example, Alternative #2, worst case scenario, will become the Planned Marketing Strategy and that strategy implementation example is used to illustrate the RT Tracking System in Figures 16-60.

[00204] Data from Tracking Mode I ROI model (Figure 8) also feeds an analysis of customer behavior patterns, showing the cause and effect of customer relationships, Interaction by Interaction as well as the pattern punctuated by the major events or milestones in the customer life cycle. These behavior patterns when appended by Awareness/Satisfaction Research findings provides management with insight on what contacts and as well as groups of contacts are more likely to do, making the potential business intelligence more robust.

User Interfaces of the Marketing Business System (MBS):

[00205] Figures 16 through 60 are exemplary embodiments of user interfaces utilized by the MBS in the data collection and tracking process. Through a series of user interfaces, the user is guided to enter data and create a relationship structure within the system that builds profiles, tracks interactions, and other parameters important to managing the business. The information provided through the user interfaces depicted in Figures 16 through 60 is stored in centralized database services and retrieved as requested. Many variations of particular user interfaces or screens viewable by the user can be utilized. The following description using XYZ Company as an example refers to one set of screens that can be used to prompt the user to make the necessary inputs to enable the system to generate various reports, charts, or status reports. Of course, many variations of such screens are possible.

[00206] Figure 16 is an exemplary embodiment of a user interface, also known as an Access page 392 of MBS 10 (shown in Figure 1.) Access page 392 is displayed to allow the user to log onto the system. The system authenticates the user after verifying a user's identification name and a password. If the user is not authenticated, system 10 displays a message to the user advising the user to log in again. Access page 392 also downloads and displays two individual hypertext links entitled "Submit" which leads to the "Stratix Relationship Tracking System" 394 and "Stratix Systems" which leads to "Stratix Relationship Tracking System Map" 396.

[00207] In yet another embodiment, once a user has been authenticated, the user is directed to a customer center user interface (not shown). From the customer center user interface, the user selects Tracking System as the service the user wishes to access, which connects the user to the Tracking System Priority Action user interface 400 which serves as a home page shown in Figure 17. It will be recognized by those skilled in the art that there are multiple other possible embodiments that can be utilized in securing the system as well as accessing the home page through the secured system.

[00208] Figure 17 is an exemplary embodiment of a "Priority Action" user interface 400 which serves as the home page of the MBS. User interface 400 provides the user with an ability to view Planned Interactions 402 and Past Due Interactions 404. Priority Action user interface 400 is downloaded and displayed when the user has selected Tracking System hypertext link 394 (shown in Figure 16) and provided appropriate authentication criteria to the system to validate the user's identity. User interface 400 displays an Interaction Date, a Type of the Interaction, a Name of a Contact, a Company Name, a Phone Number, and Contact Evolution Level (CEL) Number. There are two planned interactions, a first Interaction 406 and a second Interaction 408. First Interaction 406 refers to a Lily Corporation, while second Interaction 408 refers to a Fish Tail Company.

[00209] User interface 400 further displays "Go To" hypertext link. Selection of "Go To" hypertext link, takes the user directly to that specific interaction, wherein the user may enter or edit the data, as necessary. Additionally, Print, Help, List, Home, Back, Next, End and Top are some of the alternative buttons and hypertext links available to the user in using the system. In an exemplary embodiment, User interface 400 utilizes a side frame which utilizes seven different navigational buttons, tabs or hypertext links to guide the user through various sections. These sections include, but are not limited to, Interaction 410, Priority Action 412, Search Contact 414, Add Contact 416, Add Relationship 418, Reports 420, and Utility 422. These hypertext links or navigational buttons appear on every user interface allowing the user to access any specific user interface simply by selecting the specific navigational button from any given user interface.

[00210] Figure 18 is an exemplary embodiment of an "Interaction" user interface 426 downloaded and displayed by MBS 10 when the user has selected Interaction 408 (shown in Figure 17). The "Interaction" use interface serves as the control center for using MBS 10 with each contact. MBS 10 downloads and displays relevant information about the company as well as the contact person on user interface 426. User interface 426 further downloads Planned Interactions, Current Interactions, Notes, Next Interaction Information including date, and a complete Interaction Record

to-date with Mr. Palm, the contact person at the FishTail Company. Interaction records include a User's Name, a Date the Interaction Occurred, a Type of the Interaction, Response Information, a CEL Number, and any pertinent Notes regarding this Interaction that may be relevant in concluding the business with this contact. Select Contact Information, Select Profiling Questions, and Select Knowledge Screening are some of the alternatives available to the user in moving from one screen to another. MBS 10 utilizes pull down menus to provide the user various options in selection of a specific category or a section. Voicemail, Email and FAX are alternative buttons and hypertext links added to aid the user in using the system.

[00211] Figure 19 is a continuation of an "Interaction" user interface 430 downloaded and displayed by the MBS when the user has selected Interaction 408 (shown in Figure 17). User interface 430 is a continuation of user interface 426 (shown in Figure 18) and provides additional information relating to past interaction records with Fish Tail Company.

[00212] Figure 20 is a continuation of an "Interaction" user interface 440 downloaded and displayed by the MBS when the user has selected Interaction 408 (shown in Figure 17). User interface 440 is a continuation of user interface 430 (shown in Figure 19).

[00213] Figure 21 is an exemplary embodiment of a "Search Contact" user interface 460 downloaded and displayed by MBS 10 when the user has selected Search Contact 414 (shown in Figure 17). The user may access this user interface by selecting the "Search Contact" hypertext link from any other user interface on which the Search Contact hypertext link is displayed. The user has several options to search information from database including but, not limited to, searching by a First Name, a last Name, a Company Name, a last Interaction Date, a Planned Interaction Date, a CEL #, or utilizing search filtered database or sorted database. The user may also utilize search screen by sorting database by selecting a first, a second or a third search parameter and selecting a sort button. After deciding and inputting the criteria, the user requests the system to search the database by selecting a Search button. MBS 10 downloads and displays relevant information

based on the criteria submitted by the user. Through user interface 460, the user selects "Plants Unlimited" as a Company Name, a minimum and maximum Last Interaction Date and Planned Interaction Date, and selects the search button. Once the user has received relevant contact information from the database the user selects the contact desired and selects the Go To button.

[00214] Figure 22 is an exemplary embodiment of an "Interaction" user interface 500 downloaded and displayed by MBS 10 when the user has selected "Plants Unlimited" as a Company Name, and selected the search button shown in user interface 460 (shown in Figure 21) and then selected the contact name Herbert Ficus. MBS 10 downloads and displays relevant information about the Plants Unlimited as well as the contact person on user interface 500. User interface 500 further downloads Planned Interactions, Current Interactions, Notes, Next Interaction information including a date, and a complete Interaction Record to-date with Mr. Ficus, the contact person at the Plants Unlimited Company. Interaction records include a User's Name, a Date the Interaction Occurred, a Type of the Interaction, Response information, a CEL Number, and any pertinent Notes regarding this Interaction that may be relevant in concluding the business with this contact. Select Contact Information, Select Profiling Questions, and Select Knowledge Screening are some of the alternatives available to the user in moving from one screen to another. MBS 10 utilizes pull down menus to provide the user various options in selection of a specific category or a section.

[00215] Figure 23 is a continuation of an "Interaction" user interface 510 downloaded and displayed by MBS 10 when the user has selected "Plants Unlimited" as a Company Name and selected the search button identified in user interface 460 (shown in Figure 21). User interface 510 is a continuation of user interface 500 (shown in Figure 22) and provides additional information relating to past interaction records with Plants Unlimited.

[00216] Figure 24 is a continuation of an "Interaction" user interface 520 downloaded and displayed by the MBS when the user has selected Interaction 460 (shown in Figure 21). User Interface 520 is a continuation of user interface 510

(shown in Figure 23) and provides additional information relating to past interaction records with Plants Unlimited.

[00217] Figure 25 is a continuation of an "Interaction" user interface 530 downloaded and displayed by the MBS when the user has selected Interaction 460 (shown in Figure 21). User interface 530 is a continuation of user interface 520 (shown in Figure 24) and provides additional information relating to past interaction records with Plants Unlimited.

[00218] Figure 26 is an exemplary embodiment of an "Interaction" user interface 560 downloaded and displayed by MBS 10 when the user has selected "Plants Unlimited" as a Company Name and selected the search button shown in user interface 460 (shown in Figure 21). MBS 10 downloads and displays relevant information about the Plants Unlimited as well as the contact person on user interface 560. User interface 560 is identical to user interface 500 (shown in Figure 22). This Planned Interaction is a follow-up to Figure 22's Interactions. User interface 560 displays Planned Interactions, Current Interactions, Notes, Next Interaction Information including a date, and a complete Interaction Record to-date with Mr. Ficus, the contact person at the Plants Unlimited Company. Interaction records include a User's Name, a Date the Interaction Occurred, a Type of the Interaction, Response information, a CEL Number, and any pertinent Notes regarding this Interaction that may be relevant in concluding the business with this contact.

[00219] Through user interface 560, the user enters the information relating to a Current Interaction. In this exemplary embodiment, the user identified as "NPatel" has followed up with Mr. Herbert Ficus, the CEO of Plants Unlimited and has signed the contract to manage Gizmos – a service that is being sold by the user's company. The user further enters a Next Interaction Date and a Type of the Interaction planned with Plants Unlimited. The next interaction event identified as C4-8 relates to handing off the Plants Unlimited account responsibility to the Customer Care department, per the instructions given by Mr. Ficus.

[00220] Figure 27 is a continuation of an "Interaction" user interface 590 downloaded and displayed by MBS 10 when the user has selected "Plants Unlimited" as a Company Name and selected the search button identified in user interface 460 (shown in Figure 21). User interface 590 is a continuation of user interface 560 (shown in Figure 26) providing additional information relating to past interaction records with Plants Unlimited.

[00221] Figure 28 is a continuation of an "Interaction" user interface 580 downloaded and displayed by the MBS when the user has selected Interaction 460 (shown in Figure 21). User interface 580 is a continuation of user interface 570 (shown in Figure 27) and provides additional information relating to past interaction records with Plants Unlimited.

[00222] Figure 29 is a continuation of an "Interaction" user interface 590 downloaded and displayed by the MBS when the user has selected Interaction 460 (shown in Figure 21). User interface 590 is a continuation of user interface 580 (shown in Figure 28) and provides additional information relating to past interaction records with Plants Unlimited.

[00223] Figure 30 is a continuation of an "Interaction" user interface 600 downloaded and displayed by the MBS when the user has selected Interaction 460 (shown in Figure 21). User interface 600 is a continuation of user interface 590 (shown in Figure 29).

[00224] Figure 31 is an exemplary embodiment of an "Interaction" user interface 620 when a user named "JKauke" selects a Planned Interaction option as a follow-up to Figure 26's Interactions. User interface 620 displays Planned Interactions 622, Current Interactions 624, and Interaction Records 626. Current Interaction 624 relates to a first customer care follow-up required for client – Plants Unlimited. The user enters the information pertaining to the user's interaction. In this exemplary embodiment, the user, Mr. Kauke talked to Clarence, who promised the user that Clarence would get back to Mr. Kauke on a minor change to the contract. A Next Interaction event 628 and a Date 630 is also entered by the user – Mr. Kauke.

[00225] Figure 32 is a continuation of an "Interaction" user interface 630 downloaded and displayed by the MBS 10. User interface 630 is a continuation of user interface 620 (shown in Figure 31) and provides additional information relating to past interaction records with Plants Unlimited. User interface 630 also displays the most recent interaction 632 by the previous user – Npatel, had with Mr. Ficus on the contract. It also reflects the brief summary 634 of the understanding reached between Mr. Ficus and the user on February 26th. Brief summary 634 is the same summary which was entered by the user – NPatel on February 26th through user interface 560 (shown in Figure 26). Various different CEL Numbers 636 are reflected against each interaction based on the previously stored CEL numbers in database. These CEL Numbers are determined based on the predefined CEL Level definitions and a preset IS Flow that dictates what the CEL # values are for any Interaction as well as other strategic parameters relating to XYZ Company 638. CEL Numbers 636 are later used by MBS 10 in determining various management reports.

[00226] Figure 33 is a continuation of an "Interaction" user interface 640 downloaded and displayed by MBS 10. User interface 640 is a continuation of user interface 630 (shown in Figure 32) providing additional information relating to past interaction records with Plants Unlimited.

[00227] Figure 34 is a continuation of an "Interaction" user interface 650 downloaded and displayed by the MBS 10. User interface 650 is a continuation of user interface 640 (shown in Figure 33) and provides additional information relating to past interaction records with Plants Unlimited.

[00228] Figure 35 is a continuation of an "Interaction" user interface 660 downloaded and displayed by the MBS 10. User interface 660 is a continuation of user interface 650 (shown in Figure 34) and provides additional information relating to past interaction records with Plants Unlimited.

[00229] Figures 36 through 42 are exemplary embodiments of user interfaces facilitating inputs on various Contacts useful to the user in conducting the business.

[00230] Figure 36 is an exemplary embodiment of "Add Contact" user interface 680 providing the user with an ability to add a new contact into database. Add Contact user interface 680 displays a blank Contacts page and allows the user to type in the information relating to that contact in the blank spaces. The information that the user inputs in blank contact page include, a Salutation, a Contact Name including First, Last and a Middle Name, a Title, a Company Name, a Company Address including a City Name, State, and Zip Code. System 10 further displays a Phone Number, an Extension, a Fax Number, a Cell Number, a Pager Number, Voicemail Number, Toll Free Number, an E-Mail address, a Secondary E-mail address, an URL address, a Toll Free Number, a Starting CEL Number, a Reference Number, and a Source of this Contact, Source Details and Customer Number.

[00231] Figure 37 is an exemplary embodiment of a continuation of "Add Contact" user interface 730 providing the user with an ability to add additional information regarding the contact into the database.

[00232] Figure 38 is an exemplary embodiment of "Contact Information Company Data" user interface 780 providing the user with an ability to add the contact's company data into the database. Figure 38 follows the same format as Figure 36.

[00233] Figure 39 is an exemplary embodiment of a continuation of "Contact Information Company Data" user interface 800 providing the user with an ability to add additional information regarding the contact at the company into the database. Figure 39 follows the same format as Figure 37.

[00234] Figure 40 is an exemplary embodiment of "Contact Information Personal Data" user interface 830 providing the user with an ability to add information on personal data relating to important contacts into the database. User interface 830 accumulates information such as person's hobbies, personal preferences, special interests, activities, culture, music preferences, etc. in addition to some basic personal contact information.

[00235] Figure 41 is an exemplary embodiment of a continuation of "Contact Information Personal Data" user interface 860 providing the user with an ability to add additional information on personal data relating to important contacts into the database.

[00236] Figure 42 is an exemplary embodiment of "Contact Information Relationships" user interface 890 providing the user with an ability to add relationship information against each contact into the database. For example, the information that Mr. White is the Chairman and the boss of Mr. Ficus is added to the database. Similarly, Ms. Joy is the billing person contact and Mr. Orchid is the assistant to Mr. Ficus. Using this feature the user can subordinate others in the customer (or prospective customer) company to the primary contact.

[00237] Figure 43 is an exemplary embodiment of "Voice Mail Script" user interface 900 providing the user with a script 902 that the user should use during the initial acquisition of a client. There are several versions of scripts 902 stored in the database and are retrieved by the user depending on each situation by selecting the voicemail button 904.

[00238] Figures 44 through 46 are exemplary embodiments of user interfaces documenting a First Outbound Telemarketing Script to be used during an acquisition phase of a client. An Outbound Telemarketing Script provides the user with a written script, which the user uses in actual conversation. When appropriate depending upon the individual responses from the contact, the user may use the FAX 1002 or Email 1004 buttons to facilitate the activity. A box is available against each question to record the response from the individual who is being targeted. The script further guides the user to move from one question to another based on the user's response. The data entered in each box is stored instantaneously in the database for future retrieval. The data recorded based on individual responses builds a strong profile in the database regarding the individual and the company he represents. The data is shown on the user interfaces in Figures 44 through 46 and as appropriate in the Knowledge Screens Figures 53 through 58. Figure 44 is a first screen 1000 of the First Outbound Telemarketing Script user interface. Figure 45 is a second screen

1010 of the First Outbound Telemarketing Script user interface. Figure 46 is a third screen 1020 of the First Outbound Telemarketing Script user interface. Additional scripts are available by selecting Select Profiling Questions for a pull down menu, highlighting the selection and selecting the Submit button.

[00239] Figures 47 and 48 are exemplary embodiments of user interfaces documenting a list of Profiling Questions Closing Script to be used during a closing phase of a transaction. Profiling Questions Closing Script provides the user with a written script, which the user uses in actual conversation. To print the questions to take on an appointment, the user selects the Print 1032 button. A box is available against each question to record the response from the individual who is being profiled relating to the experiences during the closing phase as well as the overall experience so far. The data accumulated focuses on potential contract situation with XYZ Company, and other relevant information about the company that may help facilitate in generating additional revenues. The script further guides the user to move from one question to another based on the user's response. The data entered in each box is stored instantaneously in the database for future retrieval. The data recorded based on individual responses builds a strong profile in the database regarding the individual and the company he represents. The data is shown on the user interface in Figures 47 and 48 and as appropriate in the Knowledge screens Figures 53 through 58. Figure 47 is a first screen 1030 of the Profiling Questions Closing Telemarketing Script user interface. Figure 48 is a second screen 1040 of the Profiling Questions Closing Telemarketing Script user interface.

[00240] Figures 49 and 50 are exemplary embodiments of a user interface 1050 documenting a list of Profiling Questions Retention Script to be used during a retention phase of a transaction. Profiling Questions Retention Script user interface 1050 provides the user with a written script of questions, which the user utilizes in actual conversation. A box is available against each question to record the response from the individual who is being profiled relating to the experiences during the retention phase as well as the overall experience so far. The data accumulated focuses on service performance of XYZ Company, and other relevant information

about the contact company that may help facilitate in generating additional revenues and retaining the customer. The script further guides the user to move from one question to another based on the user's response. The data entered in each box is stored instantaneously in the database for future retrieval. The data recorded based on individual responses builds a strong profile in the database regarding the individual and the company he represents. The data is shown on the user interface in Figure 49 and as appropriate in the Knowledge Screens Figures 53 through 58. Figure 49 is a first screen 1050 of the Profiling Questions Retention Script user interface. Figure 50 is a second screen 1060 of the Profiling Questions Retention Script user interface.

[00241] Figures 51 and 52 are exemplary embodiments of user interfaces documenting a list of Profiling Questions Retention Survey Script to be used during a first retention survey after the transaction has been closed and the customer had some initial experience with the XYZ company, service and personnel. Profiling questions Retention Survey Script provides the user with a written script, which the user uses in actual conversation. Profiling Questions focus on Customer Satisfaction, Industry Trend and Targeting Information. A box is available against each question to record the response from the individual who is being profiled relating to the experiences during the retention phase as well as overall experience so far. The data accumulated focuses on service performance of XYZ Company, and other relevant information about the company that may help facilitate in generating additional revenues and retaining the customer. The script further guides the user to move from one question to another based on the user's response. The data entered in each box is stored instantaneously in the database for future retrieval. The data recorded based on individual responses builds a strong profile in the database regarding the individual and the company he represents. The data also helps management evaluate the CEL Level of the individual based on their answers. Survey #1 attempts to determine if the contact has moved past Expectant or Trial Levels. Figure 51 is a first screen 1070 of the Profiling Questions Retention Survey #1 user interface. Figure 52 is a second screen 1080 of the Profiling Questions Retention Survey #1 user interface. Additional scripts are available by selecting Select Profiling

Questions for a pull down menu, highlighting the selection and selecting the Submit button.

[00242] Figures 53 through 60 are exemplary embodiments of Knowledge Screens user interfaces providing useful information to the user based on the information accumulated by the system. The information in the Knowledge Screens can come from purchased lists, company historical records, direct responses from the contacts, appended research data, and others.

[00243] Figure 53 is an exemplary embodiment of a Relationship Value Screen user interface 1090 providing the user with an ability to obtain and add additional information regarding the relationship the user has with Plants Unlimited. Relationship Value Screen user interfaces 1090 summaries the method by which a business assigns value to its relationship with a contact from simple ratings like priority for closing the sale or increasing revenue to the contact's influence 1092 in terms of referrals and references and beyond. More sophisticated valuations of Customer Lifetime Value (CLV) 1094 are compared to the contact's Net Contribution to the business with the difference guiding management in its treatment of the contact. Additionally, a value could be placed on the testimonials, referrals and references or other ways contacts use their influence to help. This value could then augment the Net Contribution to the business to give a more accurate picture of the value of the contact to the business.

[00244] Figure 54 is a continuation user interface 1100 of the Relationship Value Screen user interface providing additional details 1104 on CEL Level movement, Interactions and cost. An Individual Interaction ROI (I ROI) Report 1182 on the individual contact provides management an overview of the individual contact's history of CEL Level movement, Interactions and cost. The aggregate of this datastream from all contacts in the database provides the basis for a key report from MBS 20, the Interaction ROI (I ROI) Models Report, which captures patterns of customer behavior.

[00245] Figure 55 is an exemplary embodiment of a Products/Services user interface 1110 providing the user information on Products and Services that are being purchased by the customer -- Plants Unlimited. It focuses on a number of units to be managed, a start date of the contract, a yearly revenue anticipated from this contract, monthly revenue, a length of the contract and other pertinent details summarizing the current relationship between the XYZ Company and Plants Unlimited.

[00246] Figure 56 is an exemplary embodiment of a Company Information user interface 1120 providing the user with an ability to obtain the business information about Plants Unlimited. User interface 1120 summarizes information about Plants Unlimited. The information includes, but not limited to, a Size of the company, a SIC code, an Industry type, a Type of the Business, Year ending information, Years in Business, Credit Rating and other pertinent information about the company.

[00247] Figure 57 is an exemplary embodiment of a Business Intelligence user interface 1130 providing the user with Plants Unlimited business intelligence information. Business Intelligence user interface 1130 summarizes what has been learned about the contact from a variety of research avenues—internal as well as external sources. By appending results of existing and ongoing awareness and satisfaction market research to the contact record, the results can be correlated with the expected behavior or predictability of people to improve forecasting accuracy.

[00248] Figure 58 is a continuation user interface 1140 of the Business Intelligence user interface providing a key report. An Individual Correlation with Awareness/Satisfaction Research 1142 provides management with insight on what the contact is likely to do. The aggregate of this data stream from all contacts in the database provides the basis for another key report from the MBS 10, the Correlation with Awareness/Satisfaction Research Model Report, which appends data to a customer behavior pattern making the potential business intelligence more robust.

[00249] Through the Acquisition and Closing Phases, the movement to another CEL Level can be defined by what people (or contacts) do and that can be correlated to what they say in awareness and satisfaction research. In Retention, however, movement from one CEL Level to another is defined by customers in surveys with Front Office staff and corroborated by supplemental tracking research. It is where they say they are, correlated to what they do. This correlation is very important. Unless tracked, it is difficult to interpret what people say in satisfaction interviews into meaningful predictions of future behavior. By correlating what people do with what they say, awareness and satisfaction becomes much more powerful.

[00250] Figure 59 is an exemplary embodiment of an Add Relationship user interface 1150 providing the user with an ability to add relationship information for a specific contact name that was acquired during the discussion with the CEO of Plants Unlimited. Figure 59 follows the same format as Figures 36 and 38.

[00251] Figure 60 is a continuation user interface 1160 of the Add Relationship user interface allowing the user additional information such as an alternative address and a name of the delivery team involved in the transaction. Figure 60 follows the same format as Figures 37 and 39.

[00252] Figure 61 is an exemplary embodiment of a Reports user interface 1300 providing the user with an ability to print various management reports. User interface 1300 lists the names of various management reports and provides hypertext links to access these reports. In an exemplary embodiment, the input templates used by and the reports generated by MBS 10 include, but are not limited to:

Input Templates:

[00253] Strategic Brand Readiness (SBR) Factor Template

<u>Customer LifeCycle Profitability Model Template</u>
<u>Interaction ROI (I ROI) Template</u>

Reports:

Strategic Brand Readiness (SBR) Summary Report

Customer LifeCycle Profitability Alternative Strategies Comparison

Customer LifeCycle Profitability Summary Report

Interaction ROI (I ROI) Summary Reports
- Phase Level Process
- Phase Level Events
- CEL Level Process
- CEL Level Events

Individual Interaction ROI (I ROI) Report
Interaction ROI (I ROI) Model Report
Individual Correlation with Awareness/Satisfaction Research
Correlation with Awareness/Satisfaction Research Model Report

Deposition of Contacts Summary Reports
- By Phase Level
- By Status
- By Origination

Top Priority Customers Profile Reports
- Characteristics
- Attributes

[00254] MBS 10 generates a wide variety of management reports. Exemplary embodiments of some of these reports with brief explanations on how the reports can be used by management in mitigating risk and maximizing profit flows are included in Appendix - E. In addition, a report grid that summarizes the use, purpose and benefit of the templates and reports is included in Appendix E. Further Appendix E includes an example that pertains to a company (XYZ Company) and its use of the MBS.

[00255] Figure 62 is a flow chart 1500 providing an overview of the road map from the perspective of the user. Flow chart 1500 is downloaded and displayed by server system when the user selects a hypertext link entitled "Stratix Relationship Tracking System Map" 396 (shown in Figure 16). Flow chart 1500 is the pictorial representation of the user steps and the possible options available to the user.

[00256] While the invention has been described in terms of various specific embodiments, those skilled in the art will recognize that the invention can be practiced with modification within the spirit and scope of the claims.